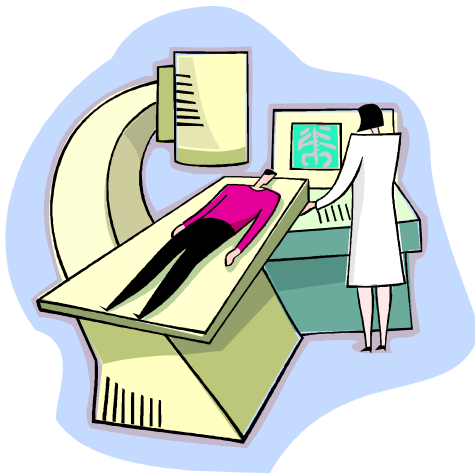
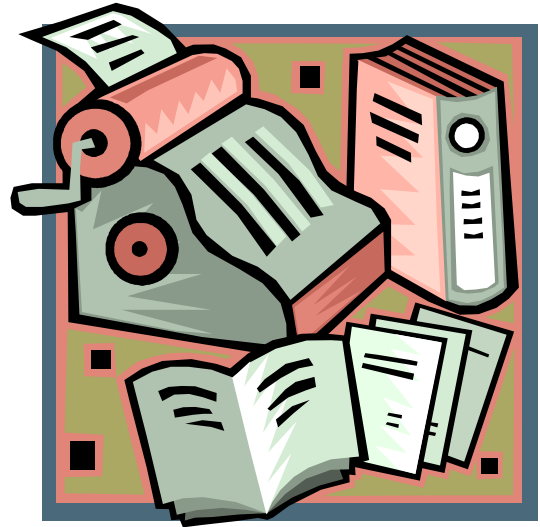


**Department of
Veterans Affairs**

**Draft
MATERIEL MANAGEMENT PROGRAM**



SELF EVALUATION GUIDE

**Office of Acquisition and Materiel Management
Washington, DC 20420**

MATERIEL MANAGEMENT PROGRAM

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INTRODUCTION

This guide is to be used to evaluate the overall performance of the Materiel Management Program. This guide should be used at least every 6 months, and the Chief, Manager, or Supervisor of the MM section, or the Chief Logistics Officer should complete it. This guide is divided into six sections and includes general functionalities of the typical Materiel Management Program. If a section of parts of the guide do not apply, a full explanation is required.

Purpose. This guide contains standards for evaluating Department of Veterans Affairs (VA) Materiel Management programs (e.g. equipment procedures, inventory, and reports). These standards, referred to as Self-Evaluation Guide, are to be followed by personnel conducting performance reviews of the Materiel Management Program. The findings of this evaluation should be shared with Associate Director and other appropriate officials at the medical center.

Applicability. This guide applies to all VA Materiel Management Programs nationwide.

References. Required regulations that should be referenced in conjunction to this guide are: VA Catalog No. 3, Section VII, VA Directive and Handbook 1761.2, VA Directive and Handbook 7125, VA Directive and Handbook 7127, VA Directive and Handbook 7343, VA Directive and Handbook 7345, VA Directive and Handbook 7346, FPMR, 41 CFR, FAR, VAAR.

MM SELF – EVALUATION GUIDE GENERAL

SECTION A

	Yes	No	Comments
1. Does the Program have a current organizational chart?	<input type="checkbox"/>	<input type="checkbox"/>	_____
2. Are the Program's hours of operation listed?	<input type="checkbox"/>	<input type="checkbox"/>	_____
3. Is there a Materiel Management Procedure Manual/SOP?	<input type="checkbox"/>	<input type="checkbox"/>	_____
4. Is there a disaster plan?	<input type="checkbox"/>	<input type="checkbox"/>	_____
5. Does it include a call back cascade?	<input type="checkbox"/>	<input type="checkbox"/>	_____
6. Are there fire and safety plans in place?	<input type="checkbox"/>	<input type="checkbox"/>	_____
7. Is there a computer contingency plan?	<input type="checkbox"/>	<input type="checkbox"/>	_____
8. Is the Position Descriptions current?	<input type="checkbox"/>	<input type="checkbox"/>	_____
9. Is the Competency Assessment Checklists current?	<input type="checkbox"/>	<input type="checkbox"/>	_____
10. Is there an annual training plan in the MM Section?	<input type="checkbox"/>	<input type="checkbox"/>	_____
11. Are training records maintained and available?	<input type="checkbox"/>	<input type="checkbox"/>	_____

MM SELF – EVALUATION GUIDE EQUIPMENT ACQUISITIONS

SECTION B

	Yes	No	Comments
1. CLASSIFICATION			
a. Is property classified in accordance with VA Catalog No. 3, Section VII and/or Integrated Supply Management System (ISMS) and is it classified correctly?	<input type="checkbox"/>	<input type="checkbox"/>	_____
b. Are all new equipment acquisitions reviewed to insure that:			
1. It is receipted properly?	<input type="checkbox"/>	<input type="checkbox"/>	_____
2. Entered into the automated inventory system?	<input type="checkbox"/>	<input type="checkbox"/>	_____
3. Mandatory inspection completed?	<input type="checkbox"/>	<input type="checkbox"/>	_____
4. Is it tagged with an identification label (bar codes) and/or security tags?	<input type="checkbox"/>	<input type="checkbox"/>	_____
c. Are upgrades and/or betterments posted to the applicable EIL entry in the General Ledger?	<input type="checkbox"/>	<input type="checkbox"/>	_____
2. EQUIPMENT ACQUISITION PLANS			
a. Is there an Equipment Acquisition Plan and is there a procedure in place for acquisitions? (VA Handbook 7125, Part 3, Section 2.401-50.)	<input type="checkbox"/>	<input type="checkbox"/>	_____
b. Is the Capital Investment Board (CIB) approval obtained on required acquisitions that are above threshold? (Information Letter 90-00-4)	<input type="checkbox"/>	<input type="checkbox"/>	_____
c. Are you using the replacement criteria as defined in FPMR 101-25.4?	<input type="checkbox"/>	<input type="checkbox"/>	_____
d. Does the director or equivalent approve items that are not due for replacement yet? (VA Handbook 7125, Part 3, Section 4.401.53)	<input type="checkbox"/>	<input type="checkbox"/>	_____
e. Are all items checked for space and utilities prior to procurement?	<input type="checkbox"/>	<input type="checkbox"/>	_____
f. Are VA and Federal Agencies excess checked for first source of supply in accordance with the 41 CFR; FAR, Part 8, Section 8.001 and VAAR, Part 808.001?	<input type="checkbox"/>	<input type="checkbox"/>	_____
g. Are equipment request reviewed for Exchange/Sale program (i.e. trade-in)? (VA Handbook 7346.1-1.200.50)	<input type="checkbox"/>	<input type="checkbox"/>	_____

3. NATIONAL ACQUISITION CENTER (NAC) PROCUREMENT

- | | | | |
|--|--------------------------|--------------------------|-------|
| a. Is there a requisition log for all NAC acquisitions? | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| b. Does each requisition have a file for documentation of complete acquisition? | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| c. If applicable, are trade-ins offered, accepted and property physically removed and dropped from official automated records? | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| d. Are requisition delivery dates reviewed and status updated? | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| e. Are receiving reports processed and forwarded to the NAC? | <input type="checkbox"/> | <input type="checkbox"/> | _____ |

4. TESTING-EVALUATION OF EQUIPMENT

- | | | | |
|--|--------------------------|--------------------------|-------|
| a. Are agreement forms signed by manufacturers representative and VA representative for equipment for Test and Evaluation? (VHA Handbook 1761.1) | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| b. Is incoming inspection performed prior to Testing and Evaluation of equipment and is documentation on file? | <input type="checkbox"/> | <input type="checkbox"/> | _____ |

SELF – EVALUATION GUIDE EQUIPMENT - MAINTENANCE OF RECORDS

SECTION C

	Yes	No	Comments
1. ACCOUNTABLE OFFICER			
a. Is there an Accountable officer designated at your facility?	<input type="checkbox"/>	<input type="checkbox"/>	_____
b. Is Accountable Official responsible for:			
1. The Supply Fund Stock?	<input type="checkbox"/>	<input type="checkbox"/>	_____
2. All Expendable Inventories?	<input type="checkbox"/>	<input type="checkbox"/>	_____
3. Non-Expendable Inventories?	<input type="checkbox"/>	<input type="checkbox"/>	_____
4. Completeness and accuracy of property accounts?	<input type="checkbox"/>	<input type="checkbox"/>	_____
5. Approval of Adjustment Vouchers?	<input type="checkbox"/>	<input type="checkbox"/>	_____
c. If other than the Chief, A&MM, is a letter of delegation on file? (7125.2.5002b)	<input type="checkbox"/>	<input type="checkbox"/>	_____
2. REPORT OF SURVEY (ROS)			
a. Is the VA Form 1217, Report of Survey, being utilized to report incidents of lost, damaged or destroyed property? (7125.5.1.5101a)	<input type="checkbox"/>	<input type="checkbox"/>	_____
b. Are you maintaining a Report of Survey Register for each fiscal year? (7125.5.3.5101-2a)	<input type="checkbox"/>	<input type="checkbox"/>	_____
c. Are copies of VA Form 1393, Uniform Offense Report, included with the ROS when required? (7125.5.9.5101.8b)	<input type="checkbox"/>	<input type="checkbox"/>	_____
d. Were board findings and recommendations forwarded to the appropriate official for action? (7125.5.21.5101-21a)	<input type="checkbox"/>	<input type="checkbox"/>	_____
e. If the investigation resulted in an employee being charged with pecuniary liability, has appropriate documentation been forwarded to Fiscal Service for preparation of a Bill for Collection? (7125.5.23.5101.23)	<input type="checkbox"/>	<input type="checkbox"/>	_____
f. If the investigation resulted in a non-employee being charged with pecuniary liability, has appropriate documentation been forwarded to District Counsel for review? (7125.5.20.5101.20)	<input type="checkbox"/>	<input type="checkbox"/>	_____
g. Are completed survey action files coordinated and appropriate action accomplished by Accountable Officer? (7125.5.21.5101-21)	<input type="checkbox"/>	<input type="checkbox"/>	_____

3. PHYSICAL INVENTORIES

- | | | | |
|--|--------------------------|--------------------------|-------|
| a. Are physical inventories of all non-expendable equipment items being conducted?
(7127/1.4.3.5301-4) | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| b. Is the schedule for performing non-expendable equipment inventories based on the accuracy of the previous inventory? (7127/1.5.5302.3b) | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| c. Do you have an EIL inventory schedule that includes, dates of inventory, title of responsible official, date of notification of responsible official and date of completion of all adjustments made? (7127/1.5302.3.2c) | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| d. Are quarterly spot checks of EIL records being completed to verify inventory accuracy?
(7127/1.5302.5e) | <input type="checkbox"/> | <input type="checkbox"/> | _____ |

4. RECONCILIATION

- | | | | |
|--|--------------------------|--------------------------|-------|
| a. Are the non-expendable equipment accounts being reconciled with fiscal accounts on a monthly basis? (7127/3.4.5608-1) | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| b. Is research being completed to identify discrepancies and adjustments being made promptly? (7127/3.4.5608-1a(1)) | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| c. Are you meeting the year-end certification requirement to reconcile EIL records and accounts? (7127/3.4.5608-1a(2)) | <input type="checkbox"/> | <input type="checkbox"/> | _____ |

5. LOANS OF EQUIPMENT

- | | | | |
|--|--------------------------|--------------------------|-------|
| a. When loaning VA owned property, are you obtaining approval from the Facility Director?
(7127.3.1.5201a) | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| b. Are loans being documented in a jacket file and reviewed periodically (60days) to ensure property is returned or loan is extended?
(7127.3.1.5201a(7)) | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| c. Is Accountable Officer or designee-issuing property passes? | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| d. For all loans of property leaving the facility, are you confining the loans to other VA's, Government agencies, local, state and charitable institutions (with the exception of d through f listed in 7127.2.5202a.)? | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| e. Is loaned equipment to the VA being identified with a tag or label? (7127.3.2.5202b) | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| f. Do you have a policy covering Personally-owned Property Placed In Official Use?
(7125.1.3.150) | <input type="checkbox"/> | <input type="checkbox"/> | _____ |

6. REVOCABLE LICENSE

- a. When issuing a revocable license is the format identified in 7127.9902 being utilized? (7127.3.4.5204b) ☐ ☐ _____
- b. Are the revocable licenses being reviewed/renewed on a yearly basis? (7127.3.2.5202b) ☐ ☐ _____
- c. Are you requiring reviews by District Counsel before approval by facility director of the revocable license? (7127/3.9901) ☐ ☐ _____
- d. During revocable license period are items being maintained on EIL and inventoried? (7127.3.4.5204g) ☐ ☐ _____
- e. Upon expiration of the license was the property returned to facility? (7127.3.4.5204e) ☐ ☐ _____

7. PERSONAL OWNED PROPERTY PLACED IN OFFICIAL USE.

- a. Is there a local policy governing Personal Owned Property Placed in Official Use? (7125.1.3.150) ☐ ☐ _____
- b. Does the policy include that all property placed in official use for the convenience of the government will also be maintained and serviced by the government? (7125.1.3.150a) ☐ ☐ _____
- c. Does the policy include that the Accountable Officer notify Facility Management of all such equipment in order for this property to obtain safety clearance. (7125.1.3.150c) ☐ ☐ _____

SELF – EVALUATION GUIDE

EQUIPMENT-FINAL DISPOSITION

SECTION D

	Yes	No	Comments
1. TURN-INS:			
a. Is there a turn-in procedure in place at the facility for disposal of Non-Expendable items?	<input type="checkbox"/>	<input type="checkbox"/>	_____
b. Is the turn-in procedure being followed?	<input type="checkbox"/>	<input type="checkbox"/>	_____
c. Is a turn-in register maintained?	<input type="checkbox"/>	<input type="checkbox"/>	_____
d. Are turn-in requests picked up and processed timely?	<input type="checkbox"/>	<input type="checkbox"/>	_____
e. When turn-in requests are picked up, is accountability transferred from the EIL Responsible official to Materiel Management?	<input type="checkbox"/>	<input type="checkbox"/>	_____
f. Are items indicated for disposal being identified and status updated in the Automated Equipment Inventory System?	<input type="checkbox"/>	<input type="checkbox"/>	_____
g. Is ADP equipment, hard drives, being reviewed and certified that all sensitive data/software has been removed prior to disposal?	<input type="checkbox"/>	<input type="checkbox"/>	_____
h. Is medical equipment decontaminated prior to removal from the point of use by warehouse staff? (i.e. blood, body fluids, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	_____
i. In accordance with VA Handbook 7343 and FPMR 101-43.304 are you utilizing AAMS/FEDS System or SF120 (Excess)/SF126 (Sales)?	<input type="checkbox"/>	<input type="checkbox"/>	_____
j. As final action, are disposals of capitalized items being posted to the applicable EIL entry in the General Ledger and automated equipment inventory system?	<input type="checkbox"/>	<input type="checkbox"/>	_____
2. EXCESS			
a. Is EIL excess redistributed within the facility first?	<input type="checkbox"/>	<input type="checkbox"/>	_____
b. Is Station Excess/Unrequired Property advertised to other VA's?	<input type="checkbox"/>	<input type="checkbox"/>	_____
c. When excessing capitalized equipment to another facility/station, are the General Ledger Transactions accomplished?	<input type="checkbox"/>	<input type="checkbox"/>	_____
d. Is the automated equipment inventory being updated for all non-expendable, expensed items that are excessed to another facility/station?	<input type="checkbox"/>	<input type="checkbox"/>	_____
e. When excessing Non-expendable equipment			

to another facility/station, is a VA Form 90-134 or equivalent being completed and processed?

<input type="checkbox"/>	<input type="checkbox"/>	_____
--------------------------	--------------------------	-------

- f. After VA reutilization processes, if property remains unclaimed, and it is reportable to GSA, is it being reported to GSA via FEDS? (VA Handbook 7343.3.1.304-1(a))

<input type="checkbox"/>	<input type="checkbox"/>	_____
--------------------------	--------------------------	-------

- g. After federal screen process, is GSA contacting the facility to determine method of sale?

3. SURPLUS

<input type="checkbox"/>	<input type="checkbox"/>	_____
--------------------------	--------------------------	-------

- a. If equipment is sold by GSA, does buyer sign appropriate GSA paperwork and copy of paperwork returned to GSA and a copy of the paperwork maintained in the EIL file?

<input type="checkbox"/>	<input type="checkbox"/>	_____
--------------------------	--------------------------	-------

- b. If GSA gives authorization to conduct a local sale, are the proceeds deposited into the U.S. Treasury?

<input type="checkbox"/>	<input type="checkbox"/>	_____
--------------------------	--------------------------	-------

- c. If equipment has been designated for abandonment or destruction, is item disposed of in accordance with general surplus or recycle procedures? (VA Handbook 7345, Part 3 (1) 901)?

4. SALVAGE/SCRAP

<input type="checkbox"/>	<input type="checkbox"/>	_____
--------------------------	--------------------------	-------

- a. Are salvage/scrap items being reviewed for possible recyclable potential?

<input type="checkbox"/>	<input type="checkbox"/>	_____
--------------------------	--------------------------	-------

- b. Are recycle proceeds deposited into local recycle ledger accounts in accordance with Office of Financial Policy Bulletin 95GA1-1?

<input type="checkbox"/>	<input type="checkbox"/>	_____
--------------------------	--------------------------	-------

- c. Are salvage items being offered for dismantling for use as repair parts? (VA Handbook 7343 Part 4, 5.307-55)

<input type="checkbox"/>	<input type="checkbox"/>	_____
--------------------------	--------------------------	-------

- d. Is hazardous material removed from all other non-expendable, expensed and expendable items such as refrigerators, monitors, terminals, and air conditioners prior to disposal?

<input type="checkbox"/>	<input type="checkbox"/>	_____
--------------------------	--------------------------	-------

- e. Are ID tags, such as NX tags, Barcodes, PM labels being removed from property prior to being removed from facility?

SELF – EVALUATION GUIDE INVENTORY - POSTED/UNPOSTED

SECTION E

	Yes	No	Comments
1. Are all inventories, under the responsibility of Material Management, maintained using an automated computerized Inventory Package?	<input type="checkbox"/>	<input type="checkbox"/>	_____
2. At minimum are the following inventory accounts maintained in the computerized automated inventory system:			
a. Medical/Surgical	<input type="checkbox"/>	<input type="checkbox"/>	_____
b. Dental	<input type="checkbox"/>	<input type="checkbox"/>	_____
c. Laboratory	<input type="checkbox"/>	<input type="checkbox"/>	_____
d. Imaging	<input type="checkbox"/>	<input type="checkbox"/>	_____
e. Environmental Management Service	<input type="checkbox"/>	<input type="checkbox"/>	_____
f. Engineering	<input type="checkbox"/>	<input type="checkbox"/>	_____
3. Are records reviewed to determine all recurring items that should be included in the computerized inventory program?	<input type="checkbox"/>	<input type="checkbox"/>	_____
4. Are appropriate National and Network mandated standardized items included in the computerized inventory program?	<input type="checkbox"/>	<input type="checkbox"/>	_____
5. Are volume purchase discounts being considered and utilized?	<input type="checkbox"/>	<input type="checkbox"/>	_____
6. Are fill/kill rates maintained at 95% on issued items?	<input type="checkbox"/>	<input type="checkbox"/>	_____
7. Are all items reviewed at least monthly to ensure items are not in long supply or inactive?	<input type="checkbox"/>	<input type="checkbox"/>	_____
8. Is barcoding used for the management and distribution of supplies?	<input type="checkbox"/>	<input type="checkbox"/>	_____
9. Are E-Commerce or purchase cards used for the ordering of recurring items as much as possible?	<input type="checkbox"/>	<input type="checkbox"/>	_____
10. Is the Auto-Generate Order option used?	<input type="checkbox"/>	<input type="checkbox"/>	_____
11. Are a complete physical inventory of Supply Fund and all official inventories taken within every 12-month cycle, maintaining at least 90% accuracy?	<input type="checkbox"/>	<input type="checkbox"/>	_____

12. After each Posted Stock inventory, does a disinterested party complete 5% verification? ☐ ☐ _____
13. Are the Posted Stock General Ledger accounts reconciled monthly with Fiscal? ☐ ☐ _____
14. Are monthly spot checks completed on all other managed accounts within the computerized automated inventory system? ☐ ☐ _____
15. Is standardized nomenclature provided by the National Acquisition Center or by your Network Logistics entered into the computerized inventory program for appropriate items? ☐ ☐ _____

SELF – EVALUATION GUIDE REPORTS AND OTHER

SECTION F

	Yes	No	Comments
1. REQUIRED REPORTS:			
a. Year- End Property Inventory Certification:			
Are you assuring, the Chief, A&MM, Chief, Fiscal Officer and the Medical Center Director sign certification? (7127/3.4.5608-1a(2) & IL90-00-3).	<input type="checkbox"/>	<input type="checkbox"/>	<hr/>
b. Equipment Purchased, Delivered not Installed			
Are you generating this report twice a year at the end of the 1 st and 3 rd quarters and submitting to DAS/A&MM (90M)? (7127/3.4.5608-1b(3))	<input type="checkbox"/>	<input type="checkbox"/>	<hr/>
c. Property Furnished to Any Recipient Other Than a Federal Agency			
Is the report, Interagency Reports Control Number 0015-GSA-AN, being completed annually in accordance with VA Handbook 7343.5.2.4701(a)?	<input type="checkbox"/>	<input type="checkbox"/>	<hr/>
d. The Annual Metrics Report			
Is the report being completed and submitted in accordance with VA Handbook 0100 Section 11 Reporting (a thru d)	<input type="checkbox"/>	<input type="checkbox"/>	<hr/>
e. The Annual Report of Property Disposed of pursuant to Exchange/Sale Authority			
Is the report being completed and submitted in accordance with VA Handbook 7346.2.4.305	<input type="checkbox"/>	<input type="checkbox"/>	<hr/>
f. Annual X-ray Film Usage Survey			
Is the report being completed and submitted annually in accordance with VA Handbook 7345 Part 4, 3.1002. -1	<input type="checkbox"/>	<input type="checkbox"/>	<hr/>
g. Negotiated Sales Report being submitted as outlined in VA Handbook 7345, Part 5 (2) 4702?	<input type="checkbox"/>	<input type="checkbox"/>	<hr/>
h. Annual Report on Resource Conservation and Recovery Act being submitted annually in accordance with Executive Order # 13101?	<input type="checkbox"/>	<input type="checkbox"/>	<hr/>
	<input type="checkbox"/>	<input type="checkbox"/>	<hr/>

2. OTHER:

- | | | | |
|---|--------------------------|--------------------------|-------|
| a. Recalls/Product Alerts | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| Is there a log maintained for all recalls and product alerts containing action taken? | | | |
| b. Disposal of Evidence and Drugs | | | |
| Is evidence destroyed in accordance with Police and Security regulations and documents | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| Maintained on file of such action?(Police Handbook 0730) | | | |
| c. Disposition of Unclaimed Personal Affects | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| Are affects disposed of in accordance with VA Handbook 7345.1.3.105-3? | | | |
| d. Burial Flags | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
| Are burial flag requests processed timely and register maintained? (VA Handbook 7127.2.13.503-7(c)) | | | |